REPORT ON THE STOCKYARDS, MEAT PACKING AND RELATED INDUSTRIES IN THE STOCKYARDS INDUSTRIAL DISTRICT

AS REQUESTED BY THE STOCKYARDS TASK FORCE

PLANNING AND DEVELOPMENT DEPARTMENT

S.G. McLaughlin: Commissioner

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Report on the

Stockyards, Meat Packing, and Related Industries

In the Stockyards Industrial District

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1.0 INTRODUCTION

This report has been prepared following an inquiry into the status of livestock, meat packing and related industries located within the Stockyards Industrial District. The inquiry stems from the announced closing of Canada Packers' hog and cattle slaughtering operations in Toronto scheduled for December, 1983, together with concerns about the future of the Stockyards operation itself.

Prior to the announcement of the closing at Canada Packers, draft proposals for a Part II Official Plan and accompanying Zoning By-law amendments for the Stockyards Industrial District had been prepared. The proposals call for the reaffirmation of the area as a major industrial district within the City. Study material related to these proposals has served to provide a partial background for this report. These materials have been supplemented by a survey of industries and agencies active within the Stockyards area by means of interviews and questionnaires.

The second section of this report contains a summary of the findings of the study while the third section contains recommendations as to a suggested general approach that the City could take in order to strengthen industry and stabilize employment levels in the area after December, 1983. Subsequent sections of the report outline details of the Stockyards Industrial District, recent studies and proposals and results of the survey of industries undertaken by Planning and Development Department staff.

In preparation of the report, the Ministry of Agriculture and Food was officially represented for purposes of consultation by the Director of the Ministry's Strategic Planning Branch.

2.0 SUMMARY

Principal findings of this report are as follows:

1. The Ontario Stockyards will remain in operation for at least the next 10 - 15 years. The Stockyards are characterized by obsolete design and high operating costs. They are nevertheless valued by the producers and meat packers because they provide easy mutual access, least cost freight location, ease of handling livestock, proximity to major consumer markets and retailers, good municipal water and sewage treatment facilities, large labour pool and prompt collection of payments from the buyers and disbursements of these to the producers. The producers also view the Stockyards as a valuable instrument in maintaining a market where they have a relatively free choice in their sales, allowing competition to set prices.

   For all the reasons cited above, plus the enormous costs inherent in any movement of the Stockyards, the Provincial Government has chosen not to eliminate or move them for the time being.

   Various parties familiar with the Stockyards operation believe that if and when they are relocated the relocation will take place within the greater Metropolitan Toronto Market area. A new, efficient operation would require about 50 acres of land.

   The Stockyards are pivotal to the continued stability of the meat packing, manufacturing and heavy industry in the area. Their relocation would probably lead to the demise of substantial amounts of industry in West Toronto. Most industries interviewed considered that the removal of the Stockyards would have far more serious consequences for their businesses than the closing of Canada Packers slaughtering operations at the present location.

2. The announced closing of Canada Packers' hog and cattle slaughtering operations in Toronto scheduled for December, 1983 does not represent, according to company spokesmen, the beginning of a series of closings of Canada Packers' other operations in the Stockyards area. The remaining operations are deemed to be stable. The building containing the slaughtering operation will probably be mothballed for several years, followed by a review of its status. Canada Packers has not made firm plans for its unused or underutilized properties in the Stockyards area. Canada Packers will continue to buy livestock at the Stockyards after the new Burlington and Kitchener slaughtering operations are opened. These operations will substantially replace the Company's existing Toronto operation. The announced closing will mean the layoff of 950 people, 750 of whom are unionized.

3. The Canada Packers relocation will not have a significant negative impact upon remaining meat packers and related industries in the area. Many of these companies expect to benefit from the closing by obtaining business which now accrues to Canada Packers, in particular the smaller firms. It is likely that new companies will locate in the area; some are already planning tentative expansion. The new locations of the Canada Packers' slaughtering operations will remain within a short driving distance from West Toronto, and will not necessarily result in loss of business for firms which buy or sell from Canada Packers.

4. Gainers Inc. recently sold their edible oils refinery operation on St. Clair to Canada Packers. Gainers has also just sold its meat processing operations in eastern Canada, including the Stockyards area operation, to a company organized by management level employees. Shares in the new company will be offered to all employees. The new company is called Swift Eastern Inc. The announced closing of Canada Packers' slaughtering operation is not expected to affect the new company.

5. The St. Clair-Keele area functions as a "meat terminal" for hundreds of small buyers (butcher shops, grocery stores, specialty stores, restaurants, etc.) from across the Metro Toronto area and beyond. The significance of this area as a "meat terminal" is such that, although some of the smaller companies purchase most of their livestock directly from producers or at country markets, they require a St. Clair location in order to compete in the lucrative Toronto market.

6. The meat and meat by-products industry within the Stockyards area represents a very significant portion of Toronto's economy. The Ontario Stockyards, together with the 17 firms involved in processing and packing, have a value of shipments over $1.5 billion annually. The replacement value of all the plants and equipment (excluding land) is estimated at over $300 million. They employ about 3,900 people at present. Although the overall employment levels have been steadily declining, some firms have been increasing their employment, particularly the meat by-products plants. An additional 92 jobs are projected by these firms during 1984, as indicated to Planning and Development staff in their interviews with them. However, in 1983, the employment picture will change substantially due to the closing of Prime Packers (130 jobs lost), a reduction at Canadian Dressed Meats (70 jobs), and the announced reduction at Canada Packers (950 jobs).

7. The Ontario Pork Producers Marketing Board's Toronto Yard is neither the largest nor the most efficient of their operations in Ontario. The yard was originally built to accommodate cattle and has been adapted for hogs. The plant and drainage

are considered poor and the animals are not efficiently housed. The move of Canada Packers' slaughtering operations will shift the centre of the hog market from Toronto to Kitchener, possibly leading to the demise of the present hog yard in Toronto.

A relocation of the Toronto operation is being contemplated. This move does not have a high priority at present. A new site could be easily secured. A move will probably be implemented if the Stockyards do not move within ten years. A "Stockyards" location is, however, preferred because of the common occurrence of split small truck loads of hogs and cattle, and the established market. The Marketing Board's Toronto yard employs 9 people.

8. The Stockyards area retains its good characteristics for the development and operation of heavy industry of all kinds. The meat packing complex is at the centre of this industrial area which contains a total of 120 firms employing about 8,000 people. The non-meat industries completely surround the meat packing complex and along with parkland, ravines, railway lands, commercial uses and light industry buffer the area from the residential neighbourhoods in Toronto and York. The area is reasonably well served in terms of road access by means of Black Creek Drive, which extends north to Highway 401. The trucking needs of Canada Packers were taken into account when the newly opened Gunns Road was designed. Major improvements were also undertaken on Weston Road, Keele Street and St. Clair, which were widened in order to achieve more efficient flow of truck traffic.

9. The Stockyards Industrial District appears to have considerable acreages which are vacant or underutilized. These offer a good opportunity for future redevelopment and the relocation of industries which at present have poor or unsuitable locations within the City. They include such uses as poultry plants, fish packing plants, cheese factories, fruit and vegetable packing plants, as well as red meat and meat by-product plants. All such uses generally experience problems in marginal industrial or non-industrial areas across the City, and because of odour emissions, are largely incompatible with adjacent residential or commercial uses. Odour would not be a problem in the Stockyards District, especially in new buildings.

10. There is a reasonable prospect for a stabilization of employment levels in livestock, meat packing and related industries in the period following the closing of Canada Packers' slaughtering operations in Toronto scheduled for December, 1983. This prospect could be best realized if measures outlined in the recommendations below are followed.

3.0 RECOMMENDATIONS

1. Draft proposals recommending the reaffirmation of the Stockyards Industrial District as a major industrial area in new Part II Official Plan proposals and accompanying Zoning By-law amendments have been prepared. These should now be published.

2. The City should inquire of land owners in the area together with officials of the Ontario Stockyards Board as to the availability of land and buildings for the expansion of various company operations in the area or the relocation of new firms from outside the area.

3. The City should facilitate relocation within the Stockyards area for those industries which at present have poor or unsuitable locations within the City. Prominent among these would be slaughtering and processing operations which require good accommodation on suitably zoned sites.

4. The City should monitor the operations of the livestock, meat packing and related industries in the period following the closing of Canada Packers' Toronto slaughtering operations in December, 1983.

4.0 DESCRIPTION OF THE STOCKYARDS INDUSTRIAL DISTRICT

The stockyards Industrial District is a long-established industrial area that extends for some 97.6 hectares (241 acres) in the northwest corner of the City. It includes all the lands north of the CPR tracks, from Old Weston Road to Runnymede Avenue, up to the boundary between the City of Toronto and the City of York. The district's central point of reference is the intersection of St. Clair Avenue West and Keele Street. It is one of the City's major remaining industrial districts. As of December 31st, 1981, the area contained approximately 120 firms, employing about 8,000 people. Some of these firms, such as Canada Packers, are among the largest industrial employers in the City.

The predominant uses in the district are:

a) the Ontario Stockyards;

b) the meat packing complex, which includes slaughter houses, meat packing and processing, processing of meat by-products, for a total of 18 firms;

c) a major concentration of railway, manufacturing, scrap yards, warehousing and other heavy uses; and

d) several minor pockets of housing and commercial uses interspersed in the area.

5.0 EMERGING PART II OFFICIAL PLAN

The emerging Stockyards Industrial District Part II Official Plan Proposals will re-affirm the district as the major industrial area of the City's west end. The area is to be designated as a Heavy Industrial Area and is to be preserved primarily for the Stockyards, meat packing and related industries, but also for other heavy and light industry. The meat packing complex is the core of this industrial area which contains a total of 120 firms, employing close to 8,000 people. The non-meat industries completely surround the meat packing complex, and along with parkland, ravines and railway lands, buffer the meat packing complex from the residential areas on all sides.

The land use strategy proposed in the Official Plan, with the accompanying Zoning By-law Amendments, is consistent with the City's policy of maintaining and strengthening an industrial base in the City. The role of this area within the City should be that of a "receiving area" for the relocation of numerous firms located in marginal industrial areas, or for isolated firms in residential areas. Major efforts should be made to relocate to this area other abattoires, meat packers, poultry plants, fish packing plants, cheese plants, etc. There are numerous parcels of land of

substantial size presently vacant or apparently underutilized which have good industrial redevelopment potential.

6.0 STATUS OF RED MEAT INDUSTRY IN CANADA

The Ontario Ministry of Agriculture and Food recently undertook a series of in-depth studies on the red meat sector. One study was prepared by Livestock Business Advisory Services, a firm from Kansas City. The study concluded that the feeding of cattle and hogs will remain viable long-term enterprises in Ontario.

Another study produced by the Ministry found that the Ontario industry is characterized by a mix of production systems. A substantial proportion, 36%, are small hobby or part-time operations. Large-scale producers are in the minority, both numerically and in terms of their share of production. Ontario livestock production is stable, but with few growth opportunities. Ontario, along with Alberta, will continue to dominate the cattle industry.

Unlike livestock production, the processing sector of the red meat industry is not stable. It is in a serious state of flux. The industry is undergoing a period of rationalization which has resulted in the closing of some 30 plants since 1975 across Canada. The consumption of red meat in Canada has been steadily declining, after a long-term period of growth. Per capita consumption of beef rose from 70.0 lbs. in 1960 to 84.4 lbs in 1970, to a historical high of 110.4 lbs. in 1976. By 1982, it had declined to 89.1 lbs. There is a similar declining trend in the consumption of veal, pork, mutton and lamb. Poultry consumption, however, appears to have stabilized, after reaching a high of just over 50 lbs. in 1976, which is almost double the consumption in 1960. The red meat industry now finds itself in a situation of overcapacity, largely obsolete or aging facilities, and low profit margins. Approximately 5,000 jobs have been lost across the country since 1975.

7.0 RESULTS OF RECENT SURVEY

7.1 Firms and Agencies Interviewed

In an effort to obtain up to date and accurate information on the status of the meat industry in the area, all relevant firms and agencies operating or having an interest in the area were interviewed by Planning and Development Department staff. A total of 26 personal interviews were conducted in June, 1983 as follows:

a) Meat Packing Firms:

Canada Packers Inc.
Swift Eastern Inc. (formerly Gainers Inc.)
Grace Meat Packers York Ltd.
Canadian Dressed Meats
Ryding Meat Packers Ltd.
The Beef Terminal (1979) Ltd.
Crown Meat Packers Ltd.
Corsetti Meat Packers Ltd.
Monaco Meat Packers Ltd.
Piave Meat Packers Ltd.
Dominion Meat Packers Ltd.
Stoiou Cattle Co. Inc. (Boneless Beef Division)
Banner Rendering and Packing Co. Ltd.
Bank Brothers Hides Ltd.
Levine Brothers Hides Ltd.
Canadian Natural Casings Ltd.
St. Clair Poultry Ltd.
Mariposa Meat Depot

b) Relevant Firms and Agencies:

Ontario Stockyards
Ontario Cattlemen's Association
Ontario Pork Producers Marketing Board
Ministry of Agriculture and Food:
Strategic Planning Division
Hadaway Transport Ltd.
C.N. Rail
C.P. Rail
United Food and Commercial Workers Union,

In addition, staff consulted with the City of York Planning and Development Department.

7.2 The Ontario Stockyards

The Ontario Stockyards are located on a 37 acre parcel of land on the south side of St. Clair west of Keele Street. The yards have been at this location since 1903. The yards are owned by the Ontario Government and are operated by an appointed Ontario Stockyard Board. The Board is largely made up of cattle producers from Ontario.

The Ontario Stockyards are the largest such facility in Canada and one of the largest in North America. There are 7 other public markets in Canada. The function of the Stockyards is to provide all necessary facilities and services for the livestock market place, where cattle are bought and sold through daily public auctions. Stockyards services include brokerage in the sale of cattle, calves and sheep, collection of livestock for sale,

disbursement of livestock to feed lots and slaughtering operations, and the feeding and watering of livestock in transit.

The Stockyards draw supplies of livestock from farms and feed lots within a 150 mile radius of Toronto, as well as substantial consignments from Western Canada. Markets for Stockyards livestock are found in centres throughout southern Ontario, with some consignments to bordering states. Annual deliveries to the Stockyards in 1982 were:

By Truck
- 435,000 cattle
- 122,000 calves
- 90,000 sheep
- 235,000 hogs

By Rail
- 60,000 cattle
- 64,000 calves

Approximately 40 percent of the cattle, 50 percent of the calves, and 62 percent of the sheep and lambs killed in Ontario at the present time are slaughtered in establishments within walking distance of the Stockyards.

The magnitude of the operation is such that the Stockyards have become the largest and strongest, all classes of livestock, five days per week market in North America. Although a few larger markets exist these either do not accommodate a full range of livestock or they do not operate full time. The Toronto operation is a barometer in the trade, and is recognized as the price leader across Canada.

The total value of shipments is in the order of $500 million annually, operating at an average 75 percent capacity. The replacement value of the yards is estimated to be $8,000,000. The head office of the yards is used by agents, transport companies, and other agencies involved in the trade. The Ontario Stockyards employs 62 people directly, down from 75 in 1978. However, the total employment on the Stockyards, including sales agents, related firms, etc., is currently between 275 and 300.

In addition to the cattle, veal, sheep and lamb, the Stockyards also provide the location of the Ontario Pork Producers Marketing Board's Toronto Yard on leased premises. This yard serves hog producers within a fifty mile radius around Toronto, supplying Canada Packers and Quality Meat Packers in the City. The Toronto Yard has a current value of shipments of approximately $30 million per year, shipping and receiving over 220,000 heads annually.

It is obviously due to the establishment of the Stockyards that the meat packing and associated businesses were first attracted to West Toronto. It was only two years after the Stockyards were first established that the first slaughter house was erected by

Levack in 1905. In 1907, the Gunns operation started on a site which was later to become part of the Canada Packers complex. The Harris Abattoir located there in 1910, and later it also became part of Canada Packers. By that time, Swift bought out Levack, and became a major operator in the area. The Ontario Stockyards has historically functioned as the cornerstone of the meat packing industry. Together, the Stockyards and the meat packing industry form the foundation of the industrial base of West Toronto.

7.3 Canada Packers

The Canada Packers operation within the Stockyards area represents a substantial industrial complex in its own right. The company is the largest land owner in the area, holding some 75 acres, twice the amount of land owned by the Ontario Stockyards. This figure includes approximately 5 acres recently purchased from Gainers Inc. The company's land holdings within the area now extend largely from St. Clair Avenue north to Glen Scarlett Road, and from Keele-Weston Road west to Symes Road. The company also owns three other parcels within the area, as well as other operations in the rest of the City and Metropolitan Toronto. The company is a multinational corporation, owning diverse operations across Canada, the United States, England, Mexico and Australia.

Canada Packers' operations in the study area include the following:

- Packing House Division (Slaughtering operations to be closed)
- Oils Division
- Hunnisett Plant
- Pet Foods Operation
- Shur-Gain Division
- Chemical Division
- Feather Industries Division
- Research Centre

The combined operations make Canada Packers one of the largest employers in the City of Toronto. At the present time, it employs 2,727 people in West Toronto plants, plus about 600 others across Metro. The announced closing of the hog and beef slaughter operations will eliminate 950 jobs in West Toronto. Canada Packers represents over 25 percent of the livestock marketed at the Stockyards, which is equal to approximately ten percent of the Ontario total. Markets for Canada Packers' products are found across Metropolitan Toronto, across Ontario and beyond.

7.4 Medium-Sized Meat Packers

The area contains three meat packing companies which can be termed as medium-sized. The largest of these is Swift Eastern Inc., which is located on Maybank Avenue. Swift Eastern is a new company just formed by management level employees from Gainers.

Swift has just purchased Gainers' meat processing operations in eastern Canada, including the Stockyards area operation. Shares of the new company will be offered to all employees. Swift (Gainers) employs 250, down from 500 in 1978.

Swift's slaughter facilities are currently not being used, and the company contracts its slaughter mostly to Quality Meats on Tecumseth Street in Toronto.

The Canada Dressed Meats operation, located on Ryding Avenue, and owned by Burns Foods of Calgary, Alberta, is a beef and veal operation. It has its own slaughter facilities, and also a small rendering operation. The company employs 100 people, down from 170 in 1982, but close to its employment level of 1978. The plant has been at its present location for over 30 years. Replacement value of plant and equipment is $5 to $6 million. The plant underwent some rationalization a year ago, after a period of strong growth. For several months, it did not use its own slaughter facilities, contracting its slaughter to the Beef Terminal. At present, it slaughters 1,000 head of cattle per week, down from 1,700 a year ago. One half of its cattle is purchased at the Ontario Stockyards, and is walked to the plant's slaughter house. Its edible products are sold across Metro and Ontario, and its inedibles are sold within the area and in Dundas, Ontario.

The third of the medium operations is Grace Meat Packers York Ltd., located on Glen Scarlett Road. A beef operation, this company operates a slaughter facility, a rendering operation, and a packaging and dressing operation. The plant is located in a modern building, built 14 years ago. The company employs 82 people, up from 72 in 1978. The replacement value of the plant and equipment is $7 million. The company slaughters 262 head of cattle per week, purchasing 50 percent at the Stockyards and the rest all across southern Ontario. Its edible products are sold mostly in Metro, but also in the rest of Ontario and in Quebec. Its inedibles are sold within the area.

7.5 The Beef Terminal

The Beef Terminal, located on the south side of St. Clair Avenue, across from Canada Packers, was built in 1960, and was purchased in 1979 by the employees, following the closing of the previous beef terminal company. It is now wholly owned by 53 of the 67 employees. It is a modern slaughter facility, which custom kills for its six tenant companies and four others in Metro Toronto, sometimes including Canada Packers. Its average weekly kill is 1,750 head of cattle. It sells up to 40 different by-products, such as skins, bones, blood, offals, etc. About 40% of its inedibles are sold to Orenco in Dundas, Ontario, which is owned by Canada Packers. The remainder, 60 percent, is sold within the area. The replacement value of the plant and equipment is $15

million. The Beef Terminal is a unique operation in the red meat industry. It has expanded and plans to do so again in the future.

The six tenant companies in the Beef Terminal are mostly specialty meat packers, serving specialty and ethnic stores. One of them handles most of the Kosher beef kill in the Metropolitan Toronto area. Others specialize in boneless beef, veal, blood, etc. The arrangement with the Beef Terminal, which slaughters on order, is ideal for the small packer. Collectively, these six companies ship out $50 million of products annually, employing 66 people.

7.6 Other Packers

In 1983, a medium sized packer, Prime Packers of Ryding Avenue, went out of business. A second one, Select Meats of Glen Scarlett Road, is currently in receivership. The Prime Packers site was purchased by Irving Ungerman Ltd. et al. The site has been partially leased to a new beef packing company, Ryding Meat Packers, which started operations on June 6, 1983 and employs 30 people. This company does not operate a slaughter facility, and relies on the Beef Terminal for its kill. The other half of the former Prime Packers site remains unused at the present time.

St. Clair Poultry is located on lands owned by the Ontario Stockyards. This company has been at that location for 17 years. It specializes in supplying Swiss Chalet outlets in the greater Metro Toronto area. St. Clair Poultry employs 45 people, up from 30 in 1978. The replacement value of the plant and equipment is $1.5 million.

7.7 Meat By-Products Operations

Aside from Canada Packers, which is involved in diverse meat by-products operations, there are four plants within the area which strictly process by-products. These include Banner Rendering and Packing (rendering, pet foods, tallow), Levine Brothers and Bank Brothers (curing of hides) and Canadian Natural Casings (curing of casings for sausages).

The latter company located in the area in February, 1983, in a new building on a site that was partially owned by the Ontario Stockyards and partially by the Beef Terminal. It is the only such business in the Metropolitan area, serving the large ethnic populations. The other three firms are long established firms in the area. They obtain their products largely from the area, but Banner Rendering and Packing, in particular, collects unsold meat from stores across Metro. Their markets include the large soap producers in Metropolitan Toronto, tanneries across Ontario, and international markets worldwide. These four companies collectively employ 149 people, up from 98 in 1978.

7.8 Summary of Survey Data

A survey of industries and agencies active within the Stockyards area in meat packing and related industries yielded the following data pertaining to key variables:

1. 1982 Value of Shipments - $1,561,654,000

2. Estimated Current Replacement Value of Plant and Equipment- $311,717,000

3. Employment Levels - 1983 3921 - 3946
   - 1982 4076 - 4101
   - 1978 4233 - 4278

8.0 THE ROLE OF OTHER FIRMS AND AGENCIES

8.1 The Union

The Union in the industry is the United Food and Commercial Workers Union (Local 114). Only Canada Packers, Swift, Canadian Dressed Meats and Grace Meat Packers are unionized. The current base rate is $11.99 per hour. Therefore, the loss of jobs at Canada Packers will most directly affect high earning, skilled workers. The Union is seeking a Provincial Task Force on the Canada Packers move and the meat industry. The Minister of Agriculture has assured the Union that it does not intend to relocate the stockyards.

According to the Union, wages represent less than six percent of the sale price at the time the product leaves the plant. The Union claims wages are not a significant factor in the cost of operations.

The Union expects a further rationalization of jobs by Canada Packers (i.e., additional layoffs) as a result of its recent purchase of the Gainers edible oils refinery, which is more efficient and automated than Canada Packers existing refinery. According to the Union, Canada Packers will only need about 130 new employees at its Burlington and Kitchener operations.

8.2 The Ontario Cattlemen's Association

The Ontario Cattlemen's Association is an association of independent cattle producers. It functions as a lobby group for the producers. The cattle producers are among the leading defenders of the Stockyards. They cite the easy access to meat packers, least cost freight location, ease of handling livestock, proximity to major consumer markets and retailers, good municipal water and sewage treatment facilities, large labour pool and prompt collection of payments from the buyers and disbursement of these to the operators.

These operators also view the Stockyards as a valuable instrument in maintaining a market where they can maintain a relatively free choice in their sales, allowing competition to set the prices. Generally, these operators want a market which is free of quotas, supply management controls and other onerous regulations.

8.3 The Ontario Pork Producers' Marketing Board

The Board provides a selling and marketing service for the hog producers of Ontario. The hogs are received, fed, watered and auctioned through the use of yards spread throughout Ontario. The auctioning process is automated and centralized in Toronto with the livestock graded and sold to buyers without their immediate inspection by the buyers.

The Toronto yard is located in the Stockyards on leased premises. The yard serves a fifty mile radius around Toronto, supplying Canada Packers and Quality Meat Packers in the City. It has a current value of shipments of about $30 million per year, shipping and receiving over 220,000 heads annually. It employs 9 people.

The Toronto yard is neither the largest nor the most efficient of the operations in Ontario. The yard was originally built to accommodate cattle and has been adapted for hogs. The plant and drainage are considered poor and the animals are not efficiently housed.

The move of Canada Packers' slaughtering operations will shift the centre of the market from Toronto to Kitchener, possibly leading to the demise of the present Toronto yard. A relocation of the Toronto operation is being contemplated. This move does not have a high priority at present. A new site could be easily secured. A move will probably be implemented if the Stockyards do not move within ten years. A "Stockyards" location is, however, preferred because of the common occurrence of split small truck loads of hogs and cattle.

8.4 Transport Services

Hadaway Livestock Transport is the major trucking company among many smaller firms operating at the Ontario Stockyards. It is involved in the trucking of cattle, calves, lambs and hogs to and from the Stockyards. It delivers over 2,000 truckloads of livestock annually, representing 145,000 head, or over 16 percent of the trucked livestock.

The railways continue to play a significant although declining role. The Stockyards were designed to be serviced primarily by rail, with each of the two major railways located on either side. The railways only transport cattle and calves. Some of the cattle is en route elsewhere, but has to stop at the Stockyards in order to be fed and watered in accordance with federal regulations.

Last year, CN and CP carried 124,000 head of cattle, or just over 12 percent of the total. The majority of livestock is transported by small trucking companies, sometimes owning only one vehicle. The easy highway access to the Stockyards, particularly with the recent construction of Black Creek Drive, is of great advantage to the industry. CN also services Canada Packers and the Beef Terminal with non-livestock cargo, averaging 322 cars annually at present.

8.5 Position of other Metropolitan Toronto Municipalities

Planning staff have consulted with staff from the City of York on the future of the Stockyards Industrial District. The York Planning Department is in support of the City's general approach in relation to the retention of industry, and the affirmation of the area as a stable area of diverse industrial uses, including meat packing and other heavy industry as proposed in the forthcoming Part II Official Plan. In relation to the announced closing of the Canada Packers slaughter houses, the City of York, at its meeting dated April 18, 1983 passed Resolution 406-83 urging that Metropolitan Toronto investigate the closing of Canada Packers and other industries in Metropolitan Toronto and develop strategies to help York and Metropolitan Toronto to attract and maintain industries. The motion was subsequently generally endorsed by the Cities of North York and Scarborough.

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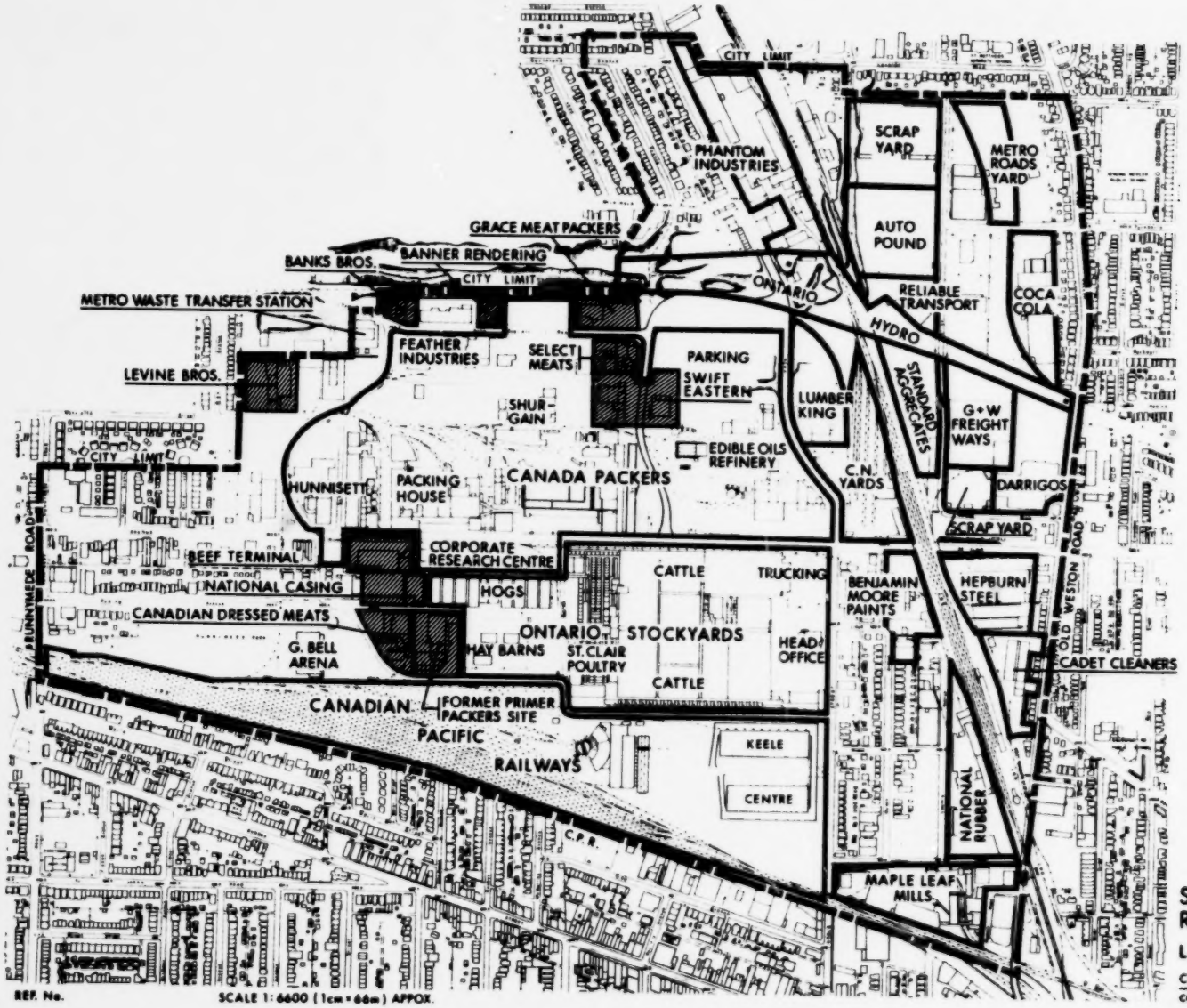

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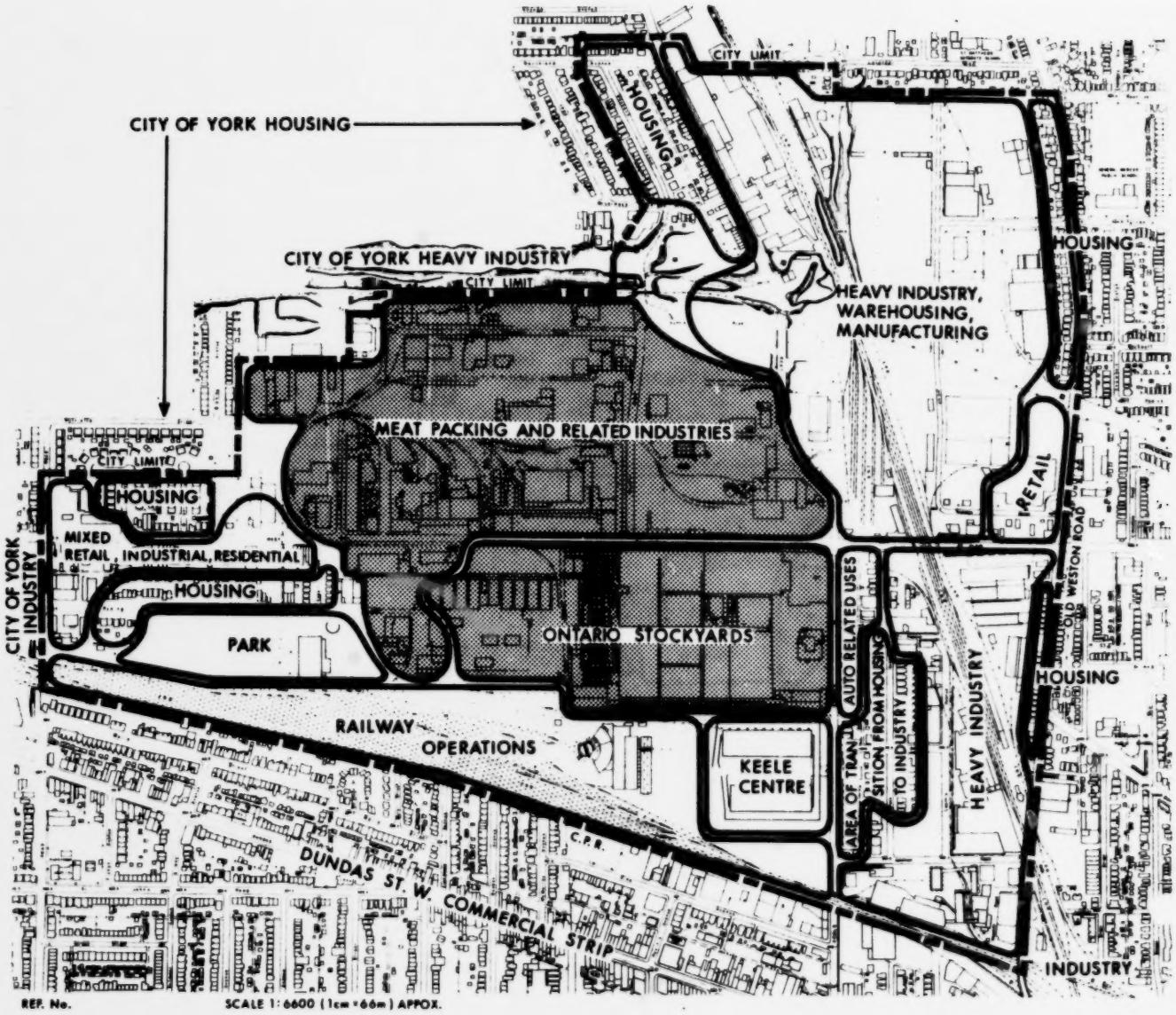
1

STUDY OF THE MEAT PACKING AND RELATED INDUSTRIES

LAND OWNERSHIP

CITY OF TORONTO PLANNING AND DEVELOPMENT DEPARTMENT

COMMUNITY AND NEIGHBOURHOOD PLANNING DIVISION JULY, 1985



2

STUDY OF THE MEAT PACKING AND RELATED INDUSTRIES

THE MEAT PACKING COMPLEX IN CONTEXT

CITY OF TORONTO PLANNING AND DEVELOPMENT DEPARTMENT

COMMUNITY AND NEIGHBOURHOOD PLANNING DIVISION AUG., 1983